

Coordinated Assessment-OTH-BOS Entry

Instructions for Adding a Client Entry

Select “Enter Data As” in the upper right corner of the screen and select the appropriate program. Then search for the client through “ClientPoint” by entering under the tab on the left of the screen.

1. Search for the client by entering their information and pressing search

Client Search

Please Search the System before adding a New Client.

Name	First First Name	Middle	Last Last Name	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number	123	- 45	- 6789	
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			

2. If the client is found by doing the “Search,” click on that client’s name. If not, the system will show that there are “No Matches” and prompt the user to “Add a New Client with this Information?” Please add new client.
3. The “Summary Page” will appear. Click over one tab to the right of the “Summary” Tab to the “Client Profile” and proceed to complete any information that you have obtained on this client. “Client Record” and “Client Demographics” will appear. Click on the pencil for each to add, change, or delete information.

Client Information Service Transactions

Summary **Client Profile** Households ROI Entry / Exit Case Managers Case Plans Measurements

1 **Client Record** Issue ID Card

Name	Kitty, Hello
Name Data Quality	Full Name Reported
Alias	HK
Social Security	142-53-6789
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	26

2 **Client Demographics**

Date of Birth	06 / 13 / 1990				
Date of Birth Type	Full DOB Reported (HUD)				
Gender	Female				
Primary Race	White (HUD)				
Secondary Race	Native Hawaiian or Other Pacific Islander (HUD)				
Ethnicity	Non-Hispanic/Non-Latino (HUD)				

3 **Save**

4. If a single person, skip to step 5, and skip over the Households tab
 - a. If family, add clients to Household tab using the “Manage Households” buttons on the “Household” tab

Client Information Service Transactions

Summary Client Profile **Households** ROI Entry / Exit Case Managers Case Plans Measurements Assessments

▼ (75446) Single

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(263826) Kitty, Hello	26	Yes	Self	06/27/2016	0	1

[Manage Household](#)

5. Obtain a “Release of Information” which must be signed by the client, and click on the “ROI” tab and complete the ROI. The “End Date” will be the date 365 days from the “Start Date.”

Client Information Service Transactions

Summary Client Profile Households **ROI** Entry / Exit Case Managers Case Plans Measurements Assessments

Release of Information

Provider	Permission	Start Date	End Date
Region Six Coordinated Assess-Pilot-OTH-BOS	Yes	06/27/2016	06/27/2017

[Add Release of Information](#) Showing 1-1 of 1

6. Click on the “Entry/Exit” tab. Click “Add Entry/Exit” and make sure the correct provider is shown. For “Type,” select “HUD.” Make sure the date and time are correct. Click on the “Save and Continue” button.

Reminder: Household members must be established on Household

Entry / Exit			
Program	Type	Entry Date	Exit Date
<input type="button" value="Add Entry / Exit"/>			

Entry Data - (263826) Kitty, Hello

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

(75446) Single

(263826) Kitty, Hello

(267616) Test, Coalition (Left Household: 09/27/2016)

Entry Data - (263826) Kitty, Hello

Provider * Region Six Coordinated Assess-Pilot-OTH-BOS (2335)

Type * **HUD**

Entry Date * 10 / 14 / 2016 4 : 04 : 38 PM

- Find the "Select an Assessment" box for the "Region Six Coordinated Assessment Pilot Program-BoS-OTH-Entry" and highlight it. The assessment will appear.

Household Members Associated with this Entry / Exit

Name	Head of Household	Entry Date	Exit Date
(263826) Kitty, Hello		10/14/2016	

Entry Assessment

Select an Assessment

Region Six Coordinated Assessment Pilot Program-BOS-OTH-ENTRY

Region Six Coordinated Assessment Pilot Program-BOS-OTH EXIT

VI-SPDA

VI-FSPDAT 2.0

- Answer each applicable question in the assessment
 - Mandatory question of the "CoC Code," for all agencies not in Lexington (Fayette County) and Louisville (Jefferson County), the answer would "BOS" (Balance of State).

Region Six Coordinated Assessment Pilot Program-BOS-OTH-ENTRY Entry Date

Client Location - CoC Code (Required Question) *

- b. Those questions with the “Add” button need to be clicked on to bring up the sub-assessment questions to be answered. Be sure to “Save” before exiting the sub-assessment questions.

 **Residence Prior to Entry**

	County of last permanent residence?	Prior Living Situation	Primary residence prior to entry?	Length of stay at prior residence?
 	Bell	Owned by client, no ongoing housing subsidy (HUD)	Living with Family/Friends	Two to six nights
Add				

- c. The “How may we locate the client?” is a way to try to get in touch with the client after they have left the facility. A relative, friend, sponsor, cell phone number for the client, or whatever number that the client can give in order to be located, should go here.

 **How may we locate the client?**

	Contact Phone Number (xxx) xxx-xxxx	Contact relationship to client	Start Date *
 	[REDACTED]	Aunt	08/22/2016
Add			Showing 1-1 of 1

9. The “Summary of Entry” is a sub-assessment that details who is entering the “VI-SPDAT v2” and their agency. It details whether or not the client is disabled, chronically homeless and the date the “VI-SPDAT v2” was entered. **This information MUST be filled out to ensure it pulls onto the Housing Prioritization List.**

 **Summary of Entry**

	User Entering VI-SPDAT 2	User Agency	Is Client Disabled?	Is Client Chronically Homeless?	Date Entered VI-SPDAT 2
 	Danielle Humes	KHC - Test	Yes	No	08/22/2016
Add					Showing 1-1 of 1

10. The “VI-SPDAT v2” is also a sub-assessment. Click on the “Add” button and answer all the questions on this assessment. At the end of the questionnaire, click “Calculate” to get the “Grand Total” score. Click “Save.”

 **VI-SPDAT v2.0**

	Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS
 	08/22/2016	0	0	3
Add				Show

11. The last sub-assessment is the “Client’s Coordinated Assessment Status?” Fill in the score from the “VI-SPDAT v2” and then choose and answer for the client’s status. The “Start Date” should auto-populate. The end date is not needed until exit. “Save and Exit” and you are finished. Note: There is a Print Option at the bottom left of the page. **This information MUST be filled out to ensure it pulls onto the Housing Prioritization List.**

 **Client's Coordinated Assessment Status?**

	VI-SPDAT Pre-Screen Total	Client's Coordinated Assessment Status	Start Date *
 	8	Client in referral status, still on VI-SPDAT list	08/22/2016
Add			